

Date: ____/____/____

Tax Return Check List – Electronic Filing

(Print answers to all questions)

Taxpayer
Name: _____

Taxpayer
Date of Birth: ____/____/____

Taxpayer Daytime
Phone: _____

- ☐ Check if taxpayer can be claimed on another's return

Employee name submitting return
(if different from taxpayer): _____

Employee Daytime
Phone: _____

- ☐ Spouse's date of birth (if applicable) ____/____/____

- ☐ Dependent children's name, SSN, and date of birth (if applicable)

NAME	SSN	Date of Birth
_____	() () () — () () — () () () ()	____/____/____
_____	() () () — () () — () () () ()	____/____/____
_____	() () () — () () — () () () ()	____/____/____

- ☐ Check if dependant can be claimed on their own return, if filed
- ☐ Federal Return signed (2 signatures if required)
- ☐ State Return signed (2 signatures if required)
- ☐ Federal W-2
- ☐ State copy of W-2 showing state withholding
- ☐ Tax information in whole dollar amounts or permission to round ____ **←(Initial here)**
- ☐ The tax filing software is more precise than the chart in the tax packet.
This difference might cause your Kentucky refund to change by no more than \$3.00. ____ **←(Initial here)**
- ☐ Name and Social Security Numbers legible
- ☐ 8453 Federal form and 8453-K Kentucky form complete
- ☐ Signed (2 signatures if joint return)
 - ☐ Direct deposit information complete if applicable
 - ☐ Social Security number(s) match paper tax returns
 - ☐ Signed by paid tax preparer, if required
- ☐ Attach original and copy of signed Federal Form 8453
- ☐ If return signed under power of attorney, attach copy of power of attorney

(Lack of information will delay processing)